

## Volunteer Management

## Policy No. 361

*The Archdiocese is committed to offering appropriate, helpful and safe programs. Such programs help us to proclaim our faith with integrity and to protect, strengthen and support our faith community through the work of volunteers.*

*The Archdiocese aims to protect children, youth and vulnerable persons and those who minister to them through the development, adoption and implementation of thorough, appropriate, consistent and ongoing screening measures for volunteers. We are committed to exemplifying our values of justice, trust and accountability by creating a safe and secure environment for everyone involved in our organization. This requires a moral, legal and spiritual obligation to safeguard, in all respects, all of those to whom we minister, particularly the vulnerable.*

**Policy Statement:**

All volunteer leaders and volunteers must undergo a screening process before serving in ministries in the Archdiocese. Volunteering orientation and training is required for all ministry personnel serving with children, youth and vulnerable persons and must be completed prior to ministry placement.

**Intent of the policy:**

To ensure that:

- We meet our ethical, moral, and spiritual responsibilities to promote trust.
- Accountability, care and safety are adhered to in our archdiocesan and parish ministries.
- Current and new volunteers meet set standards.
- Our services are managed in a safe and professional way.
- Everyone involved in ministry is aware of risk management.

**Definitions:**

**Called to Protect:** a series of training modules produced by Praesidium Inc. designed to provide dioceses including the Catholic Archdiocese of Edmonton with a comprehensive safe environments program for all directors, pastors, employees and volunteers and for those they serve.

**Child/Youth:** a person who is under 18 years of age.

**Clear Police Information Check (PIC):** no record of criminal convictions in Canada's National Repository for criminal records from a local police service.

**Event:** an occasional or one-time function or activity run by an archdiocesan office, institution, parish, camp or other approved organization.

**Ministry or Program:** a structured series of similar activities governed and run by the Archdiocese through its offices, parishes, camps or other approved organizations, Newman Theological College (NTC) or St. Joseph Seminary (SJS).

**Praesidium Inc.:** a company that through its products and services helps organizations create safe environments for their staff, volunteers, clergy and for those they serve.

**Risk Assessment:** a process by which programs are rated according to risk factors.

**Screening:** a process designed to

- create and maintain a safe environment for children, youth and vulnerable persons
- foster an appropriate match between the volunteer and a particular ministry
- protect volunteers
- safeguard limited Church resources

**Volunteer:** a person who is involved in ministries or programs but not in a leadership role and not receiving remuneration.

**Volunteer Coordinator:** a person designated by the archdiocesan office, parish, camp, or other approved organization, NTC or SJS, to maintain records of the volunteers involved with ministries and programs. (Policy No. 362)

**Volunteer Leader:** a person who takes a leadership position with any ministry, including ministries that involve direct interaction with children, youth or vulnerable persons. Example positions include: program leader, youth leader, camp counsellor, children's liturgy ministry leader and catechism leader.

**Vulnerable Persons:** "persons who, because of their age, a disability or other circumstances, whether temporary or permanent,  
a) are in a position of dependence on others; or  
b) are otherwise at a greater risk than the general population of being harmed by persons in a position of authority or trust relative to them."

[Section 6.3(1) the Criminal Records Act, R.S.C. 1985, c. C-47]

***Procedure:***

The Archdiocese Volunteer Management Committee will monitor the volunteer management process and periodically make recommendations for revision to the policy and procedure.

The volunteer management procedure outlines what is required in recruiting and selecting volunteers by a ministry or program.

## Before Selection and Recruitment

### a) Determine the risk.

Examine the potential for danger in programs and services to help prevent or eliminate the risk. For example, a volunteer who is alone with a vulnerable person necessitates a more thorough screening procedure than a volunteer who participates in a group setting. It is the nature of the ministry and the inherent risk factor that dictates the need for screening – not the character of the volunteer. (Risk Assessment Checklist – Appendix A; Risk Reduction Strategies – Appendix B)

Risk assessment includes but is not limited to the following criteria:

- Vulnerability of those served
- Nature of the service/position
- Context of the service/position
- Degree of supervision given or received

### Position Risk Ranking and Criteria

(Criteria are always subject to the requirements of a position; additional criteria may apply to a given position.)

#### • Low risk – ALL of the following criteria apply.

The position

- does not require close contact with clients or the public
- is supervised (directly or indirectly) at all times
- does not require the volunteer to handle money or food
- does not require the volunteer to drive and/or transport others.

Examples: altar server, choir member, lector

#### • Medium risk – ANY of the following criteria apply.

The position requires the volunteer

- to give information to clients or potential clients with a minimum of supervision
- to act on behalf of the organization in an unsupervised setting
- to handle money with a minimum of supervision
- to have access to the confidential files of the archdiocesan office, institution, parish, camp or approved organization.

Examples: RCIA catechist, parish finance committee member, usher

#### • High risk – ANY of the following criteria apply.

The position requires the volunteer

- to be alone and unsupervised with a client, including vulnerable persons

- to develop a close, supportive relationship with a client or group of clients
- to drive with a client as a passenger
- to be left unsupervised in a building, home or other setting operated by the archdiocesan office, institution, parish, camp or other approved organization on a regularly scheduled basis
- to have access to highly confidential information (personal/medical/financial)
- to be entrusted with control of keys, property and access to building, etc.
- to operate a variety of mechanical equipment or machinery.

Examples: altar server leader, children's liturgy leader/facilitator, volunteer driver, bookkeeper, Eucharistic minister to the sick/shut-ins

**b) Write a position description.**

Position descriptions send the message that an organization is serious about screening. Responsibilities and expectations are clearly stated, right down to the position's "dos" and "don'ts". When a volunteer changes position, the screening procedure may change according to the risk assessment. (Position Description Sample – Appendix C)

**c) Establish a formal selection and recruitment process.**

When recruiting volunteers, an archdiocesan office, institution, parish, camp or other approved organization, it must indicate that screening is part of the application process.

## **Recruitment and Selection Process**

**a) Use the Volunteer Information Form - Appendix D.**

The volunteer information form provides contact information. If the position requires other information for screening purposes (driver's record, police information check), the information form will ask for permission to access the required information.

**b) Conduct a Discernment Meeting.**

The discernment meeting provides an opportunity to talk to the potential volunteer about their background, skills, interests and availability and to determine his/her suitability for the position. (Discernment Meeting Template – Appendix E)

**c) Follow up on references (Reference Check – Appendix F).**

By identifying the level of trust required in the position and asking specific questions, the applicant's suitability may be easier to determine. People often do not expect that their references will be checked. Do not assume that applicants only supply the names of people who will speak well of them.

**d) Request a Police Information Check (PIC).**

A current Police Information Check in accordance with Policy No. 302 signals that the Archdiocese is concerned about the safety of all participants in ministries or programs.

A completed and “clear” Police Information Check (PIC) including the Vulnerable Sector background check is required as a condition of volunteering in positions of medium and high risk. A Police Information Check is required for medium and high risk positions every four (4) years. This verification requested by the Archdiocese office, parish, camp, or other approved organization, NTC or SJS is conducted by the police service to determine if the individual has a criminal record and/or a sexual offence conviction for which they have received a pardon.

A Police Information Check that has been obtained as a result of a request by an organization other than an archdiocesan office, institution, parish or camp will not be accepted; therefore a new one must be obtained.

If the Police Information Check is not “clear” and a criminal conviction is identified, it is the responsibility of the director, pastor, or volunteer leader to determine the suitability of the volunteer. A risk assessment of the volunteer must be conducted with respect to contacts with vulnerable persons, and also in relation to other employees and volunteers, and/or the duties and responsibilities of the position for which the volunteer is being considered.

Payment for the Police Information Check is the responsibility of the archdiocesan office, institution, parish, camp or other approved organization.

When a volunteer moves from a lower risk position to a higher risk position, an appropriate risk assessment must be carried out. Volunteer leaders and volunteers in certain positions (based upon risk assessment) may be required to obtain a PIC on an annual basis or other appropriate time.

**e) Request an Intervention Records Check (IRC).**

An Intervention Records Check (IRC) is a clearance check conducted by a Government of Alberta Child and Family Service Authority (CFSA) to confirm the person has not had any intervention services due to involvement with children. For a church ministry that is considered high risk, e.g., working directly with children, the Archdiocese requires volunteer leaders and volunteers to have an Intervention Records Check (IRC) in addition to Police Information Check (PIC). The

potential volunteer is responsible for completing the IRC application and submitting it in person to their local CFSA office for processing.

## **After Selection and Recruitment**

### **a) Conduct orientation and training sessions.**

Screening does not end once the volunteer is in place. Orientation and training sessions offer an opportunity to observe volunteers in a different setting. These sessions also allow organizations to inform volunteers about policies and procedures. Orientation and training includes:

- A “Called to Protect” session and other “Praesidium” training in person or online
- An introduction to the organization’s volunteer program
- A review of the Volunteer Management Policy and Procedure
- A discussion of duties and expectations of the ministry(ries)
- A tour of facilities: location of offices, classrooms, supplies, restrooms, exits, etc.
- Detailed instruction about washroom procedures and physical contact, as well as information about abuse
- Instruction on the use of available equipment (phones, faxes, computers, etc.)
- A discussion of special issues particular to the organization – for example, checking in and out procedures, confidentiality, liability, risk management, etc.
- Signing a Covenant Care Form (Appendix G)

Note: An archdiocesan office, parish, camp or other approved organization, NTC or SJS, may require additional orientation and training appropriate to the specific ministry or program.

### **b) Supervise and evaluate.**

The identified level of risk associated with a volunteer position will determine the necessary degree of supervision and evaluation. If the risk is great, it follows that the volunteer will be under close supervision. Frequent feedback in the first year is particularly important. Evaluations must be based on position descriptions.

It is strongly recommended that each volunteer receives at minimum, a performance review every two (2) years during their term in ministry.

The following indicators are guides in evaluating volunteer performance for each ministry or program.

Quantitative:

The Volunteer

- has been provided a position description or list of activities or role statement and understands what s/he is to do in the ministry.
- has agreed to commit to X hours of time to the ministry.
- attends required training sessions.
- attends all meetings of the ministry.

Qualitative:

- Participants express satisfaction in the contributions of the volunteer in responding to their identified need or purpose of the ministry.
- Volunteer Leader is satisfied with the contribution of the volunteer to the ministry or program.
- The volunteer's contributions, ideas, efforts and have contributed in a demonstrable fashion to the achievement of the goal(s) of the ministry.
- The volunteer has demonstrated spiritual/moral leadership.

Tips on Conducting a Performance Review

- Emphasize positive aspects of volunteer performance
- Tell each volunteer that the evaluation session is to improve performance, not to discipline.
- Conduct the performance review session in private with minimum interruptions.
- Formally review performance annually and more frequently for new volunteers or those whose performance is not satisfactory.
- Make feedback specific, not general or vague.
- Focus feedback on performance, not on personality characteristics.
- Stay calm and do not argue with the person being evaluated.
- Identify (jointly if possible) specific actions the employee can take to improve performance.
- As volunteer leader, end the evaluation session by stressing the positive aspects of the volunteer's performance and reviewing plans to improve performance.

c) **Follow up with ministry participants (at least annually).**

Regular contact with participants and family members can act as an effective deterrent to someone who might otherwise do harm. Volunteers should be made aware of any follow-up activities that may occur. These could include spot checks for volunteers in high-risk positions.

Participant followups are required for all high risk ministries or programs. The Director, Pastor or Volunteer Leader will conduct followups by asking:

- How long have you been served by this ministry?
- Are you satisfied with this service?
- Do you feel safe and secure with regard to the service you receive in this ministry?
- What is the name of the person(s) who provides you with this service?
- Are you comfortable with the person providing this service?
- Would you recommend this volunteer to continue in this position?

(Self-Review for Volunteers – Appendix H1 and Self-Review for Volunteer Leaders – Appendix H2)

**d) Ending the Volunteer Relationship**

Both the ministry or program and the volunteer have the ability to end the volunteer relationship.

- The ministry or program may see it fit or necessary to end with a written notification the volunteer relationship by reason of suitability or otherwise.
- The volunteer may resign by notice in writing with a reasonable notice period provided.

**e) Recognizing Volunteers**

Directors, Pastors, and Volunteer Leaders are encouraged to acknowledge and recognize the commitment, dedication and stewardship that volunteers display as they offer their time and talents to share in the mission of the Church to bring the Gospel of Jesus Christ to the world. The recognition can take many forms and would reflect an appropriate level of appreciation. Some examples of appreciation activities are: certificate, public acknowledgement at a Mass, prayers of thanksgiving at a Mass, a reception or picnic or other suitable acknowledgement.

## Appendices

- A. Risk Assessment Checklist
- B. Risk Reduction Strategies
- C. Position Description Sample
- D. Volunteer Information Form
- E. Discernment Meeting Template
- F. Reference Check
- G. Covenant of Care Form
- H1. Self-Review for Volunteers
- H2. Self-Review for Volunteer Leaders
- I. Volunteer Driver Information & Authorization



***Exception:***

A volunteer previously screened under this Policy does not require further screening for a position of equivalent risk ranking and criteria.

***Also refer to Policy:***

- No. 302 Police Information Check
- No. 354 Abuse
- No. 355 Abuse Prevention
- No. 357 Intervention – Adults
- No. 358 Intervention – Children
- No. 359 Intervention – Vulnerable Persons
- No. 360 Allegation Assessment Protocol
- No. 362 Volunteer Coordinator
- No. 909 Social Media

